

Administer Guest

HRIS 8.3

Revised February 2004

Administer Guest HRIS 8.3

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Overview of HRIS Version 8.3

The HRIS Version 8 Tutorial and Navigation Course cover the basic version 8 terminology and functionality. This document will not cover specifics of what has already been covered by the on-line applications. Some basic shortcuts and terminology are listed in Appendix A and Appendix B.

Basic Procedures

Logging on to HRIS 8.3

The database name for production is HRPRD (same as 7.51; the name did not change).
The url for HRPRD is: <http://hrsrv.lbl.gov:8000/servlets/iclientservlet/HRPRD/?cmd=start&>

1. Using Internet Explorer, type “<http://HRIS.LBL.GOV/HRPRD>” in the URL, the login page will display
2. Enter your PeopleSoft Operator ID (case sensitive)
3. Enter your password (case sensitive)
4. The window opens to the Home page with your menu groups.

Changing your Password

Roadmap

[Home](#) > [PeopleTools](#) > [Maintain Security](#) > [Use](#) > My Profile

Procedure

1. Once you've logged into PeopleSoft
2. Follow the path: [Home](#) > [PeopleTools](#) > [Maintain Security](#) > [Use](#) > My Profile
3. Click on [Change Password](#) link
4. Enter your **current Password**, tab
5. Enter a **new Password** (Reminder: Case sensitive, LBL policy, etc), tab
6. Confirm the **new Password**
7. Click **OK**, then click the **Save** button
8. Go back to **Home** to exit the password pages

Access to Records, Data and Pages

All Guest Processors will be assigned the same “Role” for accessing the parts of the system you need to work in. You should all have the same access to complete assigned duties.

You will all have:

1. Administer Guest - Lab wide [access to guest records](#). Includes privileges to view and update Personal Data, Job Data, Emergency Contact, and Track Education. This access can do all actions except correction and update in the Identification Data pages.

Data Correction and End User Support

Correction of incorrect effective dated data should be sent to Payroll@lbl.gov. If you have access to change data then by all means.... Do it!

Duplicate ID numbers, value list changes, table, and any other squirrely problems should be sent to HRIS@lbl.gov

Dagny Miurduchann	x6588	Recruitment and Administer Guest
Amy Lowe	x5044	Administer Workforce, Administer Training, and Plan Salaries
Angela Dawn	x7873	Value lists, Institution/School Tables, and Query Basics
Cynthia Coolahan	x6431	System Security and Access
Ben Ortega	x6326	Foreign Nationals, Visas, Citizenship, and Degree Verification
Mary Bishop	x5270	Policy and the RPM
Payroll	x6543	Data correction, pay issues, tax questions, PAF processing, etc.
Benefits	x6403	Health and Welfare questions, Benefit program eligibility

Functionality

HRIS Version 8.3 functionality is basically the same as 7.51. An employee record has the same components and these components relate to one another in the same fashion.

Some data fields have moved to new page locations and some pages have moved to new component locations.

Some Important Changes are:

1. **Citizenship Status** is now on the Identification Data – Citizenship/Passport page and is updated by International Researcher and Scholars Office (IRSO).
2. **Gender** and **Highest Ed Level** are on the Personal Data – Personal Information page that is now effective dated, you must insert a row to edit.
3. **LBNL Directory** has moved to the Personal Data component.
4. **Name** is a calculated field; it combines the separate entries for First, Middle and Last name fields.
5. **Union Code** is on the Job Data – LBNL Miscellaneous page.
6. The “Calculate Compensation” button on the Compensation page populates the **Comp Rate**.
7. **Employment Data** and **Benefits Participation Program** components can only be accessed through the links on the Job Data component. In other words they are like sub-components of Job Data.

A complete listing of the Components and the fields on these Components is available in Appendix B.

Page Definitions

The following pages are description of the pages and the data available on those pages. Many fields are new in version 8 and they are not used. We have tried to minimize the customization to the PeopleSoft delivered application so you will notice that many items remain both on the menus, component list and the pages.

Please disregard items that are listed and 'Not Used'. Help us to minimize the customizations.

To get to specific pages and fields the following Roadmaps may be useful:

Personal Data (Address, Name, Highest Ed Level, Gender, Ethnicity)

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Personal Data

Job Data (Job Code, Empl_class, Comprate, etc.)

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Employment Data (Supervisor ID and Appt End Date)

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Emergency Contact

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Emergency Contact

Passport/Visa Data (Citizenship Status)

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Identification Data

Personal Data

Name History

This page is effective dated. Only Name Type: Primary is used here at Berkeley Lab. Name data is entered in separate fields for First, Middle, Last, and Suffix, the concatenated Name field is populated by clicking the “Refresh the Name Field” button. Laboratory guests and employees should update this page using the Employee self-service web site. Send corrections to payroll@lbl.gov

PEOPLE Soft

Home Help Sign Out

Home > Administer Workforce > Administer Workforce > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity LBNL Personal Data LBNL Directory

EmplID: 007020 Employee

Name Type First 1 of 1 Last

*Type of Name: Primary + -

Name History First 1 of 1 Last

*Effective Date: 08/03/2002 + -

Format Using: USA United States Refresh the Name Field

Person Name

Prefix: Middle: L

First: Lauren Last: Lowe Suffix: Lowe,Lauren L

Save Return to Search Next in List Previous in List Previous tab Next tab Refresh Update/Display Include History Correct History

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

Req	Field Name	Type	Description
*	Type of Name	VL	Must be “Primary”
*	Effective Date	DT	Enter Date of Hire or Date of name change
	Format Using	LU	Defaults to USA – do not edit
	Prefix	_	Not used – leave blank
*	First	_	Enter first name (case sensitive)
	Middle	_	Enter middle name or initial (case sensitive), No period (.)
*	Last	_	Enter last name (case sensitive)
	Suffix	LU	Select from value list if applicable
*	Name	_	Click the “Refresh the Name Field” button to populate

* Required Field

Address History

This page is effective dated. Only Address Type “Home” and “Mail” are used here at Berkeley Lab. Laboratory guests and employees should update this page using the Employee self-service web site. Send corrections to payroll@lbl.gov

PEOPLE Soft

Home Help Sign Out

Home > Administer Workforce > Administer Guest > Use > Personal Data

Name History Address History Personal History Identity/Diversity Veteran Status Citizenship LBNL Personal Data

Shroff, Hari Employee EmpID: 008051

Address Type View All First 1 of 2 Last

*Address Type: HOME

Address History View All First 1 of 1 Last

*Effective Date: 09/26/2002 *Status: Active

Country: USA United States

Address 1: 3005 Ellis St., Apt F

Address 2:

City: Berkeley

County:

Postal: 94703

State: CA California

Phones First 1 of 1 Last

*Phone Type Telephone

Main 510/865-4763

Email Addresses First 1 of 1 Last

*Email Type *Email Address

Save Return to Search Previous tab Next tab Refresh Update/Display Include History Correct History


Name History | Address History | Personal History | Identity/Diversity | Veteran Status | Citizenship | LBNL Personal Data | LBNL Directory

Req	Field Name	Type	Description
*	Address Type	VL	Must be “Home” or “Mail”, use value list. For Guest: Home = Local Address and Mail = Institutional Address
*	Effective Date	DT	Enter Date of Hire or Date of new address
	Status	VL	Defaults to “Active” – most recent effdt determines current
*	Country	LU	Enter Country Code, use lookup if necessary. Default: USA
*	Address 1:	—	Enter Street Address, unit number ok here – no abbreviations
	Address 2:	—	Enter Apartment/Unit # or additional address info as needed
	Address 3:	—	Optional as needed
	Address 4	—	Optional as needed
*	City	—	Enter City name
	County	—	Not used
*	Postal	—	Enter zip code – format checking
	Province	LU	Not used
*	Phone Type	VL	Enter “Main”, use value list
*	Telephone	—	Enter home phone number for address above
	Email Type	VL	Not used
	Email Address	—	Not used here – email is on Guest Info for guests’ private accounts or LBNL Directory for lbl.gov accounts.

* Required Field

Personal History

This page is effective dated you must insert a new row to update. Send corrections to payroll@lbl.gov



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[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > **Personal Data**
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[Name History](#)
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Lowe, Lauren L Employee EmpID: 007020

Personal Data
[View All](#)
[First](#)
[1 of 1](#)
[Last](#)

*Effective Date:

08/03/2002

*Gender:

Female

*Highest Education Level:

D-Some College

Language Code:

English

*Marital Status:

Single

As of:

08/03/2002

☐ Full-Time Student

[Save](#)
[Return to Search](#)
[Next in List](#)
[Previous in List](#)
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[Update/Display](#)
[Include History](#)
[Correct History](#)


[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

Req	Field Name	Type	Description
*	Effective Date	DT	Enter Date of Hire or date of data change
*	Gender	VL	Enter Gender if known, use value list
	Higher Education Level	VL	Not Used – do not edit, Default: “Not Indicated”
	Language Code	VL	Not Used – Default: “English” – do not edit
	Marital Status	VL	Not Used – do not edit, Default: “Single”
	As of	DT	Not Used
	Full-Time Student	CB	Not Used

* Required Field

Identity/Diversity

This page is not effective dated, to update simply edit the field and save the new data.


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[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > [Personal Data](#)
New Window

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [Veteran Status](#) | [Citizenship](#)

Shroff, Hari Employee EmplID: 008051

Date of Birth: 05/07/1982 Birth Country:
 Age: Years 21 Months 0
 Date of Death: Birth Location:
☐ Waive Data Protection Original Hire Date: 09/26/2002 USA

National ID View All First 1 of 1 Last

Country	National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	999999999	<input checked="" type="checkbox"/> <input type="button" value="+"/> <input type="button" value="-"/>

USA

Ethnic Self Identification: White (not of Hispanic origin)
 Ethnic Group: 1 White


[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [Veteran Status](#) | [Citizenship](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

Req	Field Name	Type	Description
*	Date of Birth	DT	Enter Employee Birthdate (mm/dd/yyyy)
	Age	—	Auto calculated age data as of current date
	Date of Death	DT	Enter as necessary
*	Birth Country	LU	Enter County of Birth, Use Lookup
	State	LU	Enter if known, use lookup
*	Birth Location	—	Enter City, Province, State of birth
	Waive Date Protection	CB	Not used
	Original Hire Date	DT	Auto fills by system – date of first record in HRIS
	Country	—	Default: “USA”, view only
	National ID Type	—	Default: “PR”, view only
	Description	—	Default: “Social Security Number”, view only
*	National ID	—	Enter SS# if known, no field formatting. Data checked for valid # and duplicates.
	Primary ID	—	Default: “checked”, view only
	Ethnic Self Identification	LU	Enter if known, use lookup – Laboratory guests and employees should update this page using the Employee self-service web site
	Ethnic Group	—	Auto fills by system based on information entered in Ethnic Self Identification

* Required Field

Veteran Status

This page is not effective dated, to update simply edit the field and save the new data. Laboratory guests and employees should update this page using the Employee self-service web site.



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[Name History](#) [Address History](#) [Personal History](#) [Identity/Diversity](#) [Veteran Status](#) [Citizenship](#)

Shroff, Hari Employee EmplID: 008051

☐ Vietnam Era Veteran Status ☐ War/Campaign/Expedition Status

☐ Disabled Veteran ☐ Disabled

Veteran Separation Date:

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)


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Req	Field Name	Type	Description
	Vietnam Era Veteran Status	CB	Check if known, Employee enters through self service
	Disabled Veteran	CB	Check if known, Employee enters through self service
	War/Campaign.Expedition Status	CB	Check if known, Employee enters through self service
	Disabled	CB	Check if known, Employee enters through self service
	Veteran Separation Date	DT	Enter if known, Employee enters through self service

This page is not used for Guests or Contract Workers

Citizenship

This page is not effective dated, to update simply edit the field and save the new data.



HomeHelpSign Out

Home > Administer Workforce > Administer Guest > Use > HireNew Window

Name HistoryAddress HistoryPersonal HistoryIdentity/DiversityCitizenshipLBNL Personal Data

Lowe, Lauren LEmplID:

CitizenshipView AllFirst1 of 1Last

*Country: United StatesU.S. Citizenship Status:

SavePrevious tabNext tabRefreshAdd

Name History | Address History | Personal History | Identity/Diversity | Citizenship | LBNL Personal Data | LBNL Directory

Req	Field Name	Type	Description
*	Country	LU	Defaults to USA, Enter Country of citizenship
*	U.S. Citizenship Status	VL	Enter Status for citizenship as it relates to USA. Never select the value "Not Available" for guest records, this value is only to be used for contract workers)

* Required Field

Note: In keeping with recent security guidelines with respect to hosting guests (both international and US citizens), it is important that all guest processors follow the steps defined on the Guest Processing web site before inviting or renewing a guest. Processing of guests who are foreign nationals may require approval.

HRIS users responsible for the data entry of guest data in the system must be sure that the appropriate steps have been taken prior to data entry in HRIS.

LBNL Personal Data

This page is not effective dated, to update simply edit the field and save the new data.

PEOPLE Soft

Home > Administer Workforce > Administer Workforce (GBL) > Use > **Personal Data** [New Window](#)

[Name History](#) [Address History](#) [Personal History](#) [Identity/Diversity](#) **LBNL Personal Data** [LBNL Directory](#)

Lowe, Lauren L Employee **EmpID:** 007020

☐ UC Student ☐ Release Address?

Referral Comment:

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[Refresh](#) [Cor](#)

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

Req	Field Name	Type	Description
	UC Student	CB	Not Used
	Release Address?	CB	Not Used
	Referral of Comment	—	Not Used

* Required Field

This page is not used for Guests or Contract Workers

LBNL Directory

This page is not effective dated, to update simply edit the field and save the new data.


Req	Field Name	Type	Description
	Email ID	—	Autofilled/Updated by LBNL Postmaster, view only
*	Mail Drop ID	LU	Enter LBNL Mailstop, Use lookup .
	Phone Book Name	—	Display of name that will be listed in web directory. Save record to view final display format. Update in Name History or Nickname field.
	Published in Phonebook	CB	Default: unchecked. View only. Guests are not included in printed phone book. Contact tsc@lbl.gov for update.
	Hidden from Web Directory	CB	Default: unchecked. View only. Record will display on web directory, contact tsc@lbl.gov for update.
	Nickname	—	Enter alternate first name
	Nickname Code	VL	Enter desired action for nickname data. Append to add in parentheses to current name, replace to replace first name field value, blank for no display changes.
*	Location #	—	First office or lab location must be 1. Insert outer record row to have multiple office/lab locations.
*	Building	LU	Enter Bldg. number. Use lookup . Data checked.
*	Room	LU	Enter room number. Use lookup . Data checked.
*	Phones (type)	LU	First phone type must be 1- Work Phone 1, insert new row for Fax, Work Phone 2, Cell, etc.
*	Work Phone	-	Enter number, if LBNL extension number only enter the 4-digit extension, let system assign area code and prefix. If other number enter in phone format. Example:(415) 456-4657

* Required Field

Job Data

Work Location

This page is effective dated. Data can be entered during the Hire process or updated by inserting a row. Corrections must be made by the payroll group and should be sent to payroll@lbl.gov.



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[Purchase Order Info](#)

Lowe, Lauren L
Employee
EmplID: 007020

Work Location
First 1 of 1 Last

Employee Status: Active
Date Created: 08/03/2002

*Effective Date: 08/03/2002
Effective Sequence: 0

Action / Reason: Hire
HIR New Hire

*Regulatory Region: USA United States

Company: LBL Lawrence Berkeley Laboratory

*Business Unit: STDBU LBNL Business Unit

Department: HR Human Resources
Department Entry Date: 08/03/2002

Location: 0001 Berkeley

Supervisor ID: 294751 Lowe, Amy

Establishment ID: 01

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[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)

Req	Field Name	Type	Description
	Employee Status	—	Displays of active status of the data row
	Date Created	—	Displays the date when the row was entered (action date)
*	Effective Date	DT	Enter the date this data row is effective
*	Effective Sequence	—	Enter sequence of actions if multiple actions on same effdt
* / *	Action/Reason	VL	Enter Primary action code and Specific reason for the action, select from value lists.
	Regulatory Region	LU	Defaults to USA, do not change
	Company	—	Defaults to LBL, do not change
	Business Unit	LU	Defaults to STDBU, do not change
	Department	—	Leave blank, will auto fill from Dept Info tab
	Department Entry Date	DT	Leave blank, will auto fill from last update action in Dept Info
	Location	LU	Defaults to 0001, do not change – consult with payroll mgr. for changes
	Supervisor ID	LU	To update, insert a Job row. Send correction requests to payroll@lbl.gov .
	Establishment ID	—	Defaults to 01, do not change

* Required Field

Job Information

This page is effective dated. Data can be entered during the Hire process or updated by inserting a row. Corrections must be made by the payroll group and should be sent to payroll@lbl.gov.



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Lowe, Lauren L Employee EmpID: 007020

Job Information
First 1 of 1 Last

Effective Date: 08/03/2002 **Effective Sequence:** 0
Action / Reason: Hire New Hire Current

*** Job Code:** 214.3 Graduate Student Research Asst
Supervisor Level:
***Regular/Temporary:** Regular
Empl Class: GSRA
***Regular Shift:** N/A
Standard Hours: 40.00
Work Period: W Weekly

Entry Date: 08/03/2002 **Planned Exit:**
☐ End Job Automatically
***Full/Part:** Full-Time
***Officer Code:** Not Applic
Shift Rate: /
FTE: 1.00

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[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)

Req	Field Name	Type	Description
*	Job Code	LU	Enter Job Code. Use lookup. Data checked.
	Entry Date	DT	Leave blank, will auto fill with date when job code changes
	Planned Exit	DT	Leave blank, not used.
	End Job Automatically	CB	Leave blank, not used.
	Supervisor Level	LU	Leave blank, not used.
	Regular/Temporary	VL	Auto fills from Empl Class entry. (Regular: positions with no end date, Temporary: positions with end date.)
*	Full/Part	VL	Enter value, select from value list
*	Empl Class	VL	Enter value, select from value list
	Officer Code	VL	Not Used – Defaults to Not Applic.
	Regular Shift	VL	Defaults to N/A, not used in HRIS. Shift code is in LETS.
	Shift Rate	-	Defaults blank, do not change.
*	Standard Hours	–	Enter hours worked per week. 40=100%
	FTE	–	Calculates from standard hours (1.0 = 100% or 40 hrs/wk)
	Work Period	LU	Defaults to W – weekly, do not change, LBNL hours are weekly.

* Required Field

LBNL Miscellaneous

This page is effective dated. Data can be entered during the Hire process or updated by inserting a row. Corrections must be made by the payroll group and should be sent to payroll@lbl.gov.


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New Window

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Shroff, Hari Employee EmpID: 008051

LBNL Job Data First 1 of 1 Last

Employee Status: Active Date Created: 09/26/2002 + -
 Effective Date: 09/26/2002 Effective Sequence: 0
 Action / Reason: Hire HIR New Hire

Union Code: 99 Non Represented FWO Type: N STD WW
 HEERA Status: Non-Supen ☐ Confidential Employee? Job Requisition #:
 Comment:

[Job Data](#) | [Employment Data](#) | [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab
Update/Display Include History Correct History

[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Payroll](#) | [Job Data Salplan](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)

Req	Field Name	Type	Description
	Union Code	VL	Auto fills from Job Code entry, do not edit, requires LER approval.
	HEERA Status	VL	Not Used
	Confidential Employee	CB	Not Used
	FWO Type	LU	Defaults to Standard WorkWeek of 5 - 8hr days M – F. Update is done by Payroll only.
	Job Requisition	LU	Not Used
	Comment	—	Enter special comments regarding this job data row.

* **Required Field**

This page is not used for Guests or Contract Workers

Compensation

This page is effective dated. Data can be entered during the Hire process or updated by inserting a row. Corrections must be made by the payroll group and should be sent to payroll@lbl.gov.

PEOPLE Soft

Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data

Work Location Job Information LBNL Miscellaneous Payroll Job Data Salplan Compensation GSRA Data

Lowe, Angle A Employee EmplID: 8031

Compensation First 1 of 1 Last

Effective Date: 10/02/2002 Effective Sequence: 0

Action / Reason: Hire New Hire Current

Compensation Rate: 5,500.000000 *Frequency: M Monthly

Comparative Information

Change Amount: 0.000000 USD Monthly Compa-Ratio: 0.92

Change Percent: 0.000

Pay Rates

Annual 66,000.000000 USD Daily 253.846154 USD

Monthly 5,500.000000 USD Hourly 31.730769 USD

Full Time Monthly Rate: 5,500.00

Default Pay Components Contract Change Prorate Option

Pay Components First 1 of 1 Last

Amounts Changes Conversion

*Rate Code Seq Details Comp Rate Currency Frequency Percent

1 NAANNL 0 Details 5,500.000000 USD M

Calculate Compensation

Job Data Employment Data Benefits Program Participation

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

Work Location | Job Information | LBNL Miscellaneous | Payroll | Job Data Salplan | Compensation | GSRA Data | Dept Info | Purchase Order Info


Req	Field Name	Type	Description
*	Compensation Rate	—	Should be 0 for guest
*	Frequency	LU	Should be H for guest
	Comparative Information	-	Displays amount and percent changes in Compensation Rate for this row compared to the one before it.
	Pay Rates	-	Displays calculated Hourly, Daily, Monthly, and Annual rates for the Compensation Rate.
	Rate Code	LU	Not used for Guest
	Seq	—	Not used
	Details	link	Not used
	Comp Rate	—	Not used
	Currency	LU	Not used
	Frequency	LU	Not used
	Percent	-	Not used

- **Required Field**

This page is not used for Guests or Contract Workers

GSRA Data

This page is not used for Guests



[Home](#) [Help](#) [Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > [Job Data](#) [New Window](#)

[Work Location](#) [Job Information](#) [LBNL Miscellaneous](#) [Compensation](#) [GSRA Data](#) [Dept Info](#) [Purchase Order Info](#)

Lowe, Lauren LEmployeeEmpID: 007020

GSRA Job DataView AllFirst1 of 1Last

Employee Status:Active

*Effective Date:08/03/2002Current

Effective Sequence:0

Action / Reason:HireHIRNew Hire

ACTN DATE: 08/03/2002

*Job Code:214.3Graduate Student Research Asst

% Time:100.0000Std Hrs/Wk:40.00

Comp Rate:2913.000000

Project ID:

Student ID:

Student Type:

GSRA Units:

Hourly Rate:16.805769

Monthly Rate:2913.000

FT Mon Rt:2913.00

Annual Rate:34956.000

☐ UC Safe Harbor Override

[Job Data](#) [Employment Data](#) [Benefits Program Participation](#)

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#)

[Update/Display](#) [Include History](#) [Correct History](#)

[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)

This page is not used for Guests or Contract Workers

Dept Info

This page is effective dated. Data can be entered during the Hire process or updated by inserting a row. Corrections must be made by the payroll group and should be sent to payroll@lbl.gov.

PEOPLE Soft

Home Help Sign Out

Home > Administer Workforce > Administer Workforce > Use > Job Data [New Window](#)

Work Location Job Information LBNL Miscellaneous Compensation GSRA Data Dept Info Purchase Order Info

Lowe, Lauren L Employee EmplID: 007020

Job Data View All First 1 of 1 Last

Effective Date: 08/03/2002 Effective Sequence: 0

Action / Reason: Hire New Hire

Orgcode Info View All First 1 of 1 Last

Level 0: HR Human Resources

*Level 1: HR Human Resources

Level 2: IS HR Information Systems

Level 3:

Level 4:

☒ Primary Org Code

Job Data [Employment Data](#) [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)


Req	Field Name	Type	Description
	Level 0	-	Auto fills from selected Level 1, used for reporting when multiple divisions want to be grouped in one organization.
*	Level 1	LU	Enter Division/Department Code. Use lookup. Data checked.
	Level 2	LU	Enter Department/Group code. Use lookup. Data checked.
	Level 3	LU	Enter Group/Unit code. Use lookup. Data checked.
	Level 4	LU	Enter Level 4 code. Use lookup. Data checked.
	Primary Org Code	CB	Check for primary Level 1 only. One and only one orgcode row may be checked for a given job date row.

* Required Field

Insert multiple orgcode rows as needed. Max is usually only two, without repeating Level 1.

Purchase Order Info

This page is not used for Guests but is used for Contract Workers


Home Help Sign Out

[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > [Job Data](#) [New Window](#)

[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)

Lowe, Lauren L Employee EmpID: 007020

Purchase Order Info View All First 1 of 1 Last

Employee Status: Active


Effective Date: 08/03/02 Current

Action: HIR Hire


Reason Code: HIR New Hire

Effective Sequence: 0

Action Date: 08/03/02

Purchase Order Number: 

Special Rate:

Guest Group: 

Agency:

Contact:

Telephone:

Address:

Expiration Dt:

Agency Surcharge:

[Job Data](#) | [Employment Data](#) | [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)


Req.	Field Name	Type	Description
*	Purchase Order Number	LU	Enter PO number. Use look up
	Special Rate	—	Enter rate if different from amount in comprate field on Compensation tab. Used for flat rate contracts only.
	Guest Group	LU	Enter if applicable. Use look up.
	Agency	—	Auto fills from PO entry
	Contact	—	Auto fills from PO entry
	Telephone	—	Auto fills from PO entry
	Address	—	Auto fills from PO entry
	Expiration Dt	—	Auto fills from PO entry
	Agency Surcharge	—	Auto fills from PO entry

* **Required Field**

Employment

Employment Data

This page is not effective dated with a customized effective dated scroll area. To update the non effective dated fields simply edit the field and save the new data.


Home Help Sign Out

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > [Job Data](#)
New Window

LBNL Guest

Shroff, Hari Employee EmplID: 008051

Hire Date: 09/26/2002 Rehire Dt: Termination Date:

Company Seniority Date: Last Date Worked:

Service Date / Months / Days: 09/26/2002 8 / 8 Expected Return Dt:

Professional Exp Date: Probation Date:

Date Last Increase: 09/26/2002 Empl Rehire Date:

Employee Hire Date: 09/24/2002 Adj BS Yr:

Appt End Date: 09/23/2003

View All First 1 of 1 Last

*Effective Date:

Business Title:

[Job Data](#) [Employment Data](#) [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab
Update/Display Include History Correct History


[Employment Data](#) | [Employment Data2](#) | [LBNL Guest](#)

Req.	Field Name	Type	Description
	Hire Date	—	Display only, Auto fills – date of 'hire' action in HRIS
	Rehire Date	—	Display only, Auto fills – date of last rehire action
	Termination Date	—	Display only, Auto fills – date of last termination action. Disappears when record is rehired.
	Company Seniority Date	DT	Not used for guests - Auto fills on hire action
	Last Date Worked	DT	Not used for guests - Enter last date of work
	Service Date/Months/Days	DT	Not used for guests - Auto fills on hire action
	Expected Return Dt	DT	Not used for guests - Expected first date back
	Professional Exp Date	DT	Not Used
	Probation Date	DT	Not used for guests - Enter date for end of probation prd
	Date Last Increase	DT	Not used for guests - Auto fills
	Employee Hire Date	DT	Not used for guests - Auto fills
	Empl Rehire date	DT	Not used for guests - Auto fills
	Adj BS Yr	DT	Not used for guests - Enter Adjusted BS Year
*	Appt End Date	DT	Enter for all Guests. Date when appointment expires. Must not exceed the visa expiration date for foreign nationals. Site access will validate expiration of visa and appt end dates and edit as needed.
*	Effective Date	DT	Enter hire date
	Business Title	—	Optional

* Required Field

Employment Dta 2

This page is not used for Guests or Contract Workers



[Home](#) [Help](#) [Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > [Job Data](#) [New Window](#)

Employment Data

Employment Dta2

LBNL Guest

Lowe, Lauren L

Employee

EmplID: 007020

☐ UC Executive Program?

☐ Principal Investigator Status

☐ Designated Official

☐ Prior UC Service?

☐ Accepted UCRP Waiver?

Waiver Date:

Faculty Stipend:

Student Program:

Survey Code:

Service Award Type:

PIN SignDt: 08/03/2002

Exp Grad Date:

Service Award Date:

[Job Data](#)

Employment Data

[Benefits Program Participation](#)

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#)


[Update/Display](#) [Include History](#) [Correct History](#)

[Employment Data](#) | [Employment Dta2](#) | [LBNL Guest](#)

This page is not used for Guests or Contract Workers

LBNL Guest

This page is not effective dated, to update simply edit the field and save the new data.



[Home](#)
[Help](#)
[Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > [Job Data](#)
[New Window](#)

[Employment Data](#)
[Employment Dta2](#)
[LBNL Guest](#)

Lowe, Lauren L
Employee
EmpID: 007020

Guest Class: RES Research
Phone: 510/486-5044

Preparer: 294751 Lowe, Amy

Guest Email:

Reason of Visit: To work on projects.

From Date: 08/03/02 **To Date:** 12/02/02 **Facility Used:** 5 Local Divisional Facilities

Income Support
[View All](#)
[First](#)
[1 of 1](#)
[Last](#)

Institution: UCB University of California, Berkeley

☐ **Employee of Institution?**
Department:

Supplemental Funding Support
[View All](#)
[First](#)
[1 of 1](#)
[Last](#)

Inst/Fund: ACS American Cancer Society
Type: GR Grant

Amount: 1000.000
Start Date: 08/03/2002
End Dt: 12/02/2002

[Job Data](#)
[Employment Data](#)
[Benefits Program Participation](#)

[Save](#)
[Return to Search](#)
[Previous tab](#)
[Next tab](#)
[Update/Display](#)
[Include History](#)
[Correct History](#)


[Employment Data](#) | [Employment Dta2](#) | [LBNL Guest](#)

Req	Field Name	Type	Description
*	Guest Class	LU	Enter general guest class. Use look up
*	Preparer	LU	Enter your Employee ID as prepare of guest documents
	Phone	_	Auto fills work phone 1 for preparer
	Guest Email	_	Enter Guest private email address, not lbl.gov
*	Reason for Visit	_	Enter brief description of duties while here at LBNL
*	From Date	DT	Enter first date of appointment, same as hire or rehire effdt
*	To Date	DT	Enter last date of appointment, if foreign national, must not be past the visa expiration date.
	Facility Used	LU	Enter if applicable, LBNL user facilities listed. Use lookup.
*	Institution	LU	Enter Sponsoring Institution. Use look up.
*	Employee if Institution	CB	Check if guest is employee of Sponsoring Institution
	Department	LU	Enter dept at Sponsoring Institution - Optional
	Inst/Fund	LU	Optional for tacking other funding, select funding institution
	Type	LU	Optional – enter type of funding. Use look up
	Amount	_	Optional – enter amount in \$ monthly (total \$/mo)
	Start Date	DT	Optional – enter start month for funding
	End Dt	DT	Optional – enter end month for funding

* Required Field

Benefit Program Participation

This page is not used for Guests or Contract Workers but the Benefit Program should be verified, it should be "NON".


Home Help Sign Out

[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > [Job Data](#) New Window

Benefit Program Participation
 Lowe, Lauren L Employee EmplID: 007020

Deductions Taken: Deduction Deduction Subset ID:

Benefit Status First 1 of 1 Last

Effective Date: 08/03/2002 Effective Sequence: 0
 Action / Reason: Hire New Hire Current

*Benefits System: Base Benefits Benefits Employee Status: Active
 Annual Benefits Base Rate: 34956.000 USD

Benefit Program Participation View All First 1 of 1 Last

*Effective Date: 08/03/2002 *Benefit Program: NON No Eligibility Currency Code: USD

[Job Data](#) [Employment Data](#) Benefits Program Participation

Save Return to Search Update/Display Include History Correct History

Req.	Field Name	Type	Description
	Benefits System	VL	Display only, default is Base Benefits
	Benefits Employee Status	—	Display only, active status of the job row
	Annual Benefits Base Rate	—	Calculated on at time of hire or rehire. Recalculated annually.
*	Effective Date	DT	Enter Date of Hire or change in Benefit Prog eligibility
*	Benefit Program	LU	Enter appropriate Program Code, For Guest and CW should be "NON"
	Currency Code	—	Defaults to US Dollars.

- **Required Field**

Be sure to **SAVE** your changes.

Historical Employees

Use this page to establish whether the person has an existing record in HRIS or Historical Only record.

PEOPLE Soft

Home Help Sign Out

Home > Administer Workforce > Administer Guest > Use > Historical Employees - abbrev [New Window](#)

Historical Employees - abbrev

008051 Shroff, Hari

Data Source: HRIS

Status: A Active

Empl Class: Z Guest

Job Code: 100.6

Hire Date: 09/26/2002 Rehire Date:

Term Date:

Save Return to Search

This page displays the most current row of data in the requested employee record. If there is a record in this page and the record cannot be called up using the Administer Workforce (GBL) access then the record is what we call 'Historical'.

Guest Processors who do not have the Administer Workforce (GBL) access should use Administer Guest access to determine if you have access to the record. Contact HRIS@lbi.gov for clarification of a records' status. To rehire an existing employee as a Guest fax the PGI form to Payroll@lbi.gov.

A Historical Only record means that the data was not loaded in HRIS and a new "Hire" action must be done in order to establish a new record for the person.

If the record exists in both the Historical Employees search page and in the Administer Workforce (GBL) access; then the record is currently in HRIS and the appropriate rehire or other action should be done.

Emergency Contact

Contact Address/Phone

PEOPLE Soft

Home Help Sign Out

Emergency Contact View All First 1 of 1 Last

'Contact Name: Elliott, Laurie + -

'Relationship to Employee: Spouse ☒ Primary Contact

☐ Same Address as Employee

☐ Same Phone as Employee

Contact Address

Country: USA United States

Address 1: 102 Barrington Drive

Address 2:

City: Oak Ridge

County:

Postal: 37830

State: TN Tennessee

Contact Phone

Phone: 423/482-4543


Save Return to Search Next in List Previous in List

[Contact Address/Phone](#) | [Other Phone Numbers](#)

Req.	Field Name	Type	Description
*	Contact Name	—	Enter Contact Name in PS format (Last,First M)
*	Relationship to Employee	VL	Enter relationship to employee, Use value list
*	Primary Contact	CB	Check for primary contact. Only one may be 'primary'.
	Same Address as Employee	CB	Check if address is same as EE, select with type to autofill
	Same Phone as Employee	CB	Check if phone is same as EE, select phone type to autofill
*	Country	LU	Enter country of address, this will format the address fields
*	Address	—	Enter street location and apt # if applicable
*	City	—	Enter city
*	Postal	—	Enter Postal Zip code
*	State	LU	Enter State
*	Phone	—	Enter phone number, include area code

* Required fields

Other Phone Numbers



[Home](#)
[Help](#)
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[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > **Emergency Contact**
[New Window](#)

[Contact Address/Phone](#)
[Other Phone Numbers](#)

Levin, Jon C Employee **EmplID:** 000004

Emergency Contact
[View All](#)
[First](#)
[1 of 1](#)
[Last](#)

Contact Name: Elliott, Laurie [+](#) [-](#)

Relationship to Employee: Spouse ☒ **Primary Contact**

Other Phone Numbers for Emergency Contact
[View All](#)
[First](#)
[1 of 1](#)
[Last](#)

Phone Type	Phone	+	-
Business		+	-

[Save](#)
[Return to Search](#)
[Next in List](#)
[Previous in List](#)

[Contact Address/Phone](#) | [Other Phone Numbers](#)


Req.	Field Name	Type	Description
*	Phone Type	VL	Enter type of other phone, use value list
*	Phone	_	Enter phone number, include area code

* Required fields

Identification Data

The International Researchers and Scholars Office (IRSO) updates these pages. Contact IRSO for update or correction of data.

Citizenship/Passport



[Home](#) [Help](#) [Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > **Identification Data** [New Window](#)

[Citizenship/Passport](#) [Visa/Permit Data](#) [Visa Comments](#)

Schroeder, Brett Rodan Employee **EmplID:** 000002

Citizenship [View All](#) First 1 of 1 Last
'Country: GBR United Kingdom **U.S. Citizenship Status:** **EmplID:** 000002 **Dependent ID:**

Passport Information [View All](#) First 1 of 2 Last
'Passport Number: 666
Issue Date: 03/26/1999 Long Term End Dt: 03/26/2009
Country: GBR United Kingdom
Country:
City:
Authority:
Comment: xxx

Visa Entries [View All](#) First 1 of 1 Last
Entries: 1 Visa Expiry Date: 06/19/2003

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#) [Update/Display](#) [Include History](#) [Correct History](#)


[Citizenship/Passport](#) | [Visa/Permit Data](#) | [Visa Comments](#)

Req.	Field Name	Type	Description
*	Country	LU	Enter Country if citizenship, use lookup
*	U.S. Citizenship Status	VL	Enter citizenship in relation to US, use value list
	Passport Number	_	Enter passport number
	Issue Date	DT	Enter date passport issued
	Long Term End Dt	DT	Enter expiration date of passport
	Country	LU	Enter Country code that issued passport, use lookup
	City	-	Enter City that issued passport
	Authority	-	Not used
	Comment	-	Enter comment as neccessary
	Entries	LU	Enter US visa approved number of entries
	Visa Expiry Date	DT	Enter Visa expiration date

* Required for all Employees and Guests

Visa/Permit Data and Visa Comments

This page is used by IRSO for visa tracking and information. Contact IRSO if you have questions.



[Home](#) [Help](#) [Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > [Identification Data](#) [New Window](#)

[Citizenship/Passport](#) [Visa/Permit Data](#) [Visa Comments](#)

Schroeder,Brett Rodan ID: 000002
Empl Class: Guest Status: Active Appt EndDt: 09/30/1999

Visa/Permit Data View All First 1 of 1 Last

'Effective Date: 07/03/2002 Effective Sequence: 0

'Country: USA USA Renew By Date:

Immigration Classification

'Visa/Permit Type: B2 Tourist

Visa/Permit Number: 866

Immigration Classification Status

'Visa/Permit Status: Granted

Expiration Date: 09/30/1999 ☐ Program Transfer?

Visa Category: Researcher Sponsor: Other Training: Academic


☐ Two Year Home Residency Req?

Supporting Documents Needed View All First 1 of 2 Last

'Supporting Document ID:	Reqst Date	Date Recvd	Start Date	End Date
120 INS for an F1 Student			07/25/1994	09/30/1999

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Citizenship/Passport](#) | [Visa/Permit Data](#) | [Visa Comments](#)



[Home](#) [Help](#) [Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > [Identification Data](#) [New Window](#)

[Citizenship/Passport](#) [Visa/Permit Data](#) [Visa Comments](#)

Schroeder,Brett Rodan ID: 000002
Empl Class: Z Empl Status: A Appt EndDt: 09/30/1999

Comment View All First 1 of 1 Last

Effective Date: 07/03/2002 Effective Sequence: Visa/Permit Type: B2

Comment:

test??

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Citizenship/Passport](#) | [Visa/Permit Data](#) | [Visa Comments](#)

Reports and Queries

Overview

HRIS 8.3 runs both reports and queries to web based applications. The output may be printed or saved to the user's desktop according to the output selected at the time the report or query is run.

SQR and Crystal – There are two primary Report types, SQR and Crystal. Both report types 'print' the output to Adobe Acrobat. Hardcopies can be reviewed and printed from there.

Queries – Always output to an html version of Excel. Users should use the .CSV format to save the query output to their desktop. This file should be opened with Excel – the data will automatically parse the data into the worksheet. Note: Data formats for numbers (including emplid), date, time, and dollar values will need to be formatted. This version of query-excel does not impose standard formatting on the exported data fields. Tips on formatting output in Excel are included in this section.

How to Run a Report

Run Control ID

When you want to run a report or process, you need to tell the system when and where you want it to print. For most reports or processes, you also need to set parameters that determine the content of the report, such as the business unit or time period on which to report.

A run control is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create (and save) a run control with those settings. The next time you run the report, you select the run control, and the system fills in the settings.

A run control is created in "Add" mode and is saved when either the save button is pressed or when the selected report runs successfully. Once you create a run control id you should always use the same one.

How to Run an SQR Report

1. **Select the Report** you wish to run (update display mode)
2. Enter a **Run Control ID**
3. Enter **Parameters** or skip to step 4
4. Click the **"Run" button**
5. Select Server Name: **PSUNX**
6. Select Type: **Web**
7. Select Format: **PDF**
8. Click **OK**, the report will "process"
9. To view and print the report, Click the **Process Monitor link**
10. Click the **"Refresh" button** until the Run Status is **"Success"**
11. Click **Details link**
12. Click **View Log/Trace link**
13. Click **the *.pdf file link (the name will consist of the file name and run instance #)**
14. **View** and **print** report from Acrobat .pdf file

How to Run a Crystal Report

1. **Select the Report** you wish to run (update display mode)
2. Enter a **Run Control ID**
3. Enter **Parameters** or skip to step 4
4. Click the **“Run” button**
5. Select Server Name: **PSNT**
6. Select Type: **Web**
7. Select Format: **PDF**
8. Click **OK**, the report will “process”
9. To view and print the report, Click the **Process Monitor link**
10. Click the **“Refresh” button** until the Run Status is **“Success”**
11. Click **Details link**
12. Click **View Log/Trace link**
13. Click **the *.pdf file link (the name will consist of the file name and run instance #)**
14. **View and print** report from Acrobat .pdf file

How to Run a Public Query

Accessing the Query Manager

Roadmap

[Home](#) > [PeopleTools](#) > [Query Manager](#) > [Use](#) > Query Manager

How to Run an Existing Query without ‘opening the query’

1. **Search for the Query** you wish to run
 - Enter a partial query title and click the Search button (use wildcard, see Appendix A)
 - Leave search criteria blank to view all available Queries
2. Click **Search button** to list available Queries
3. Click the **Run link** on the row for the title you wish to execute, a separate IE window will open to display the prompts and results.
4. Enter **Prompts if applicable** and Click the View Results button. If the query has no prompts your query results will be displayed.
5. Results will display in IE html page. Data can be viewed or downloaded to your desktop.
6. To download to Excel – **Use the “CSV Text File” link.** Do Not use the “Excel Spreadsheet” link.
 - *CSV Text File link* creates a simple text file that is automatically opened in Excel and easily formatted
 - *Excel Spreadsheet link* creates an excel file with very unfriendly formatting. Not recommended.
7. Save the CSV file to your desktop, rename if desired.
8. Double click the CSV file on your desktop and the file will open in Excel. Format the file as needed. See Query Excel formatting tips listed below.
9. To exit the query, Close the Query – Results IE window.
10. To run a new query, Activate the Query Manager IE window, it should still be open but minimized.

NOTE: A query must be “SAVED” before it will run. If you edit any part of a query you must first save it before running.

Tips on formatting your Query Output

- 1) When you first open the CSV file, always format the spreadsheet and save.
 - a) Select all cells in the spreadsheet using the top left cell. Hot Key: Ctrl-A
 - b) AutoFit the column width – Format, Column, AutoFit Selection. Hot Key: Alt-O,C,A
 - c) Left Justify all columns – click the Align Left tool bar button
 - d) Change the .CSV format of the spreadsheet - Save your CSV file, edit the “Save as type” to be Excel Workbook, Click OK.
- 2) Use Excel’s Format, Cells menu option to standardize field by column. Fields that we suggest formatting are: Numbers (including empid), Dates, and Time.

Data Entry and Maintenance Procedures

Overview

This document defines the specific LBNL procedures for processing Guest Records in the HRIS database. Guest records are important for site access, security, emergency information, international visitor status information and divisional headcount type information to name a few. The appointment of guest status allows visitors access the laboratory computer networks, building and parking facilities. Without active and current appointments a guest can lose one or all these privileges.

In this document we will review how to:

- ◆ Enter and change non-effective dated records including:
 - ⇒ Personal Data Information
 - ⇒ Extension of Appointment
- ◆ Enter and change effective dated records including:
 - ⇒ Name/Address
 - ⇒ Supervisor ID
 - ⇒ Hire
 - ⇒ Rehire
 - ⇒ Organization code
 - ⇒ Changing Job Code
 - ⇒ Termination
- ◆ Perform Historical ID Number searches to avoid duplicate records for one guest.

Personal Data: Name, Address, Personal Profile - Effective Dated

The Name, Address and Personal Profile pages contain name, institutional, local mailing address information. In version 8.3 this page is an effective dated record; to update you must insert a row, change data then save.

Roadmap

Home > Administer Workforce > Administer Guest > Use > Personal Data
--

Procedure

1. In the Administer Guest access, select **Use**.
2. Select **Personal Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **OK**, *The Address History page will display.*
5. Click the **tab** for the data you wish to update.
6. Click the **Insert Row (+)** button
7. Enter the **Effective Date** of the new data and update any fields as necessary.
8. Click **Save**.

Personal Data: Identity/Diversity or LBNL Directory: Non - Effective Dated

The Identity/Diversity pages contain Birthdate and SS# information and LBNL Directory contains office location and phone information. These pages are single occurrence non-effective dated pages. To update data simply type over the data that is already in the field and save.

Roadmap

Home > Administer Workforce > Administer Guest > Use > Personal Data
--

Procedure

1. In the Administer Guest access, Click **Use**.
2. Click **Personal Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Address History page or list will display. If list, click the link for the record you wish to update.*
5. Click the **tab** for the data you wish to update.
6. **Edit** fields as necessary.
7. Click **Save**.

Emergency Contact: Non-Effective Dated

The Emergency Contact page has no effective date, and more than one emergency contact may be inserted for a guest.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Emergency Contact

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Emergency Contact**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Contact Address/Phone page or list will display. If list, click the link for the record you wish to update.*
5. **Update** the fields as necessary. Click the Other Phone tab to add additional phones.
6. Click the **Insert Row (+)** button to insert multiple contact or phone information.

Note: May have multiple instances but only one can be the primary.

Note: Each contact may have multiple instances of phones.

7. Click **Save**.

LBNL Host/Supervisor ID: Effective Dated

Supervisor ID is an effective-dated update. This means that you will need to insert a new record, update the information and save the information. The new row does not change the old information *it adds another layer duplicating the old information and must be changed before saving*. The old information will be saved as a history.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Job Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
5. Click **Insert Row (+)**, to create the new data row for update.
6. Update the **Effective Date**.
This date should reflect the exact effective date.
7. Update the **Action** and **Reason** fields, **(STC/SUP)**
8. On the **Work Location** tab, go to the **Supervisor ID field** and change it to the new supervisor by entering his or her employee ID.
9. Click **Save**.

Extension of Appointment: Non - Effective Dated

Extension of Appointment a single occurrence, non-effective dated field.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Link to [Employment Data](#)

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Job Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
5. The Work Location page will display, Click the **Employment Data link** at the bottom of the page. *The Employment Data page will display.*
6. **Update** the Appointment End Date.
7. Click **Save**.

Organization Codes: Effective Dated

Organization code is an effective-dated update. This means that you will need to insert a new record, update the information and save the information. The new row does not change the old information *it adds another layer duplicating the old information and must be changed before saving*. The old information will be saved as a history.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Procedure

10. In the Administer Guest access, select **Use**.
11. Click **Job Data**. *The Find an Existing Value page will display.*
12. **Enter the Employee ID** or use the name search fields.
13. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
14. Click **Insert Row (+)**, to create the new data row for update.
15. Update the **Effective Date**.
This date should reflect the exact effective date.
16. Update the **Action** and **Reason** fields, **(Transfer/REO)**
17. Click the **Department Info** tab, to go to the page for Orgcode update.
18. Click into the inner frame for the Org Code and change the **Level 1**, **Level 2**, and **Level 3** or **Level 4**, as required.
19. To insert a second organization code assignment, Click **Insert Row (+)** from within the Org code inner frame, a second occurrence of the org code fields will display for entry.
20. Click **Save**.

Historical Name Searches/Hiring/Rehiring Actions for a Guest

In PeopleSoft, HIRE is the process of creating a record for a person for the first time in the system and REHIRE is the action to reactivate an existing record, which already exists in the system.

1. The HIRE process automatically puts you in ADD mode to create a new record.
2. ALWAYS do a **Historical Employee** search by name and partial name to determine if any other numbers exist for the person.
3. Never HIRE a Guest who already has an existing record with a valid ID number. The existing record must be a termination action. The correct system action is REHIRE after the termination action.

NOTE: Valid ID numbers for HRIS records are 6-character numeric only.

1. **Any numbers starting with a “P” are old and invalid and must be evaluated.**

- i) **Contract Worker ID numbers may not be changed because they exist in other systems (accounts payable, general ledger, time/labor distribution, etc.)**
- ii) **Guest “P” number should be converted to a valid number before any actions are entered.**

2. **Multiple numbers for a person may constitute an invalid number situation. If a valid number exists for an individual use that ID number for your action.**
3. **Correction of invalid employee numbers or multiple records for any person are sent to hris@lbl.gov.**

Historical Employee Search Actions:

SITUATION	WHAT TO DO	SEND TO
New paperwork & only an Old P Number(s) exist where the person was only ever a "Contract Worker".	<ul style="list-style-type: none"> • Enter a new record allowing the system to assign a new valid ID number. • Be sure all invalid numbers have been terminated. 	<ul style="list-style-type: none"> • File your paperwork.
New paperwork & only an Old P Number(s) exist where the person was only ever a "Guest".	<ul style="list-style-type: none"> • The P number can be converted to a valid number. • Be sure all invalid numbers have been terminated. 	<ul style="list-style-type: none"> • Send email to hris@lbl.gov. We will convert the P number to a valid number and let you know when it is done. • You can then enter a "rehire" action. • File your paperwork.
New paperwork & invalid & valid numbers exist.	<ul style="list-style-type: none"> • Update the valid number. • Be sure all records with invalid numbers have been terminated. 	<ul style="list-style-type: none"> • Send email to hris@lbl.gov • File your paperwork.
<p>New paperwork to Hire or Rehire, but person is not in employee class "Z", so you cannot see the record with your Admin Guest access.</p> <p>The number is only visible in the historical search page.</p>	<ul style="list-style-type: none"> • Note the correct number and that the class needs to be made employee class "Z" for guest. 	<ul style="list-style-type: none"> • FAX the Participating Guest Info Form with the correct number, to the payroll department at FAX x4485. Payroll will do the rehire action and notify you when it is complete. Review the record for accuracy. Edit if you have access or send correction request to payroll@lbl.gov.

Investigating Historical ID Numbers

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Historical Employees

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Historical Employees**. *The Find an Existing Value page will display.*
3. Use the **name search fields** to find records with the requested name.
4. Click **Search**, *The Historical Employees page or list will display. If list, click the link for the record you wish to view.*
5. The Historical Employees data page displays for your review.
6. Use the **Next in List /Previous in List** to compare the data for like names.

Hiring a Guest: Effective Dated

The hire process should only be started after the *Historical Number Search* has revealed that the person really does require a new record.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Hire

Procedure

1. From the Administer Guest access, select **Use, Hire**.
The Add a New Value page displays.
2. Click, **Add** to let the system assign a number.
3. *The full Personal Data pages will be displayed for data entry.*
4. *Note: links at the bottom of the page to Job Data, Employment Data and Benefits Program Participation.*
5. **Enter** all required fields as listed on pages 8 though 24 of you workbook.
6. Click **Save**.
7. Enter **Emergency Contact**. Select **Use, Emergency Contact**. Use procedures for Emergency Contact Update.

Rehiring an Guest: Effective Dated

The Rehire process is used when a record already exists as a Guest of Contract Worker. The Payroll Department must do rehires of a record that is an “employee” classification. Fax the PGI form to x 4485.

Always do a historical number search before a rehire action to validate that you are using the correct employee ID number. Identify any duplicate ID numbers and notify HRIS@lbi.gov if correction is necessary.

Roadmap

Home > Administer Workforce > Administer Guest > Use > Job Data

Procedure

1. In the Administer Guest access, Click **Use**. Click **Job Data**. *The Find an Existing Value page will display.*
2. **Enter the Employee ID** or use the name search fields.
3. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
4. On the Work Location page, Click **Insert Row (+)** button, to create a new data row for update.
5. Update the **Effective Date**.
This date should reflect the exact effective date.
6. Update the **Action** and **Reason** fields.
Action: Rehire and Reason: use value list
7. Update data for fields in Job Data, Employment Data and Benefits Program Participation components as necessary. See pages 14 through 24 of you workbook. Click **Save**.
8. Go to the **Personal Data** pages and update data as necessary.
9. Select **Use, Personal Data**. Update data as necessary for fields listed on pages 8 though 14 of you workbook. Click, **Save**.
10. Go to the **Emergency Contact** pages and update data as necessary.
11. Select **Use, Emergency Contact**. Update data as necessary for fields listed on pages 26 though 27 of you workbook. Click, **Save**.

Terminating a Guest: Effective Dated

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Job Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
5. Click **Insert Row (+)**, to create the new data row for update.
6. Update the **Effective Date**.
This date should reflect the exact effective date.
7. In the **Action** field, select **Terminatn**.
8. In the **Reason** field, select from value list. If termination is to allow for rehire action as employee, see note below.
9. Click **Save**.

Note: Use the correct reason code for Guest termination:

- Termination due to end of assignment – **use TER/EOA** (end of assignment)
- Termination due to rehire as an employee classification – **use TER/CTE** (convert to employee status)

Using the Correction Action

The Correction mode is reserved for use on records requiring specific correction of data. Records may be correct in the current or the historical status.

Correction mode is to be used only for correction of data, not during the regular maintenance of records. This will increase the integrity of data.

If correction is made to any field in history, that same change must be made in all subsequent records.

Procedure

Request Correction of Guest records via email to [payroll @lbl.gov](mailto:payroll@lbl.gov).

Questions? Contact hris@lbl.gov.

Appendix A

HRIS and PeopleSoft Terminology

Search Pages

Basic Search page:

The basic search page offers just one or two fields by which you may perform your search. However, you may designate which key field you would like to search by from the **Search By** drop-down list box.

Advanced Search page:

The advanced search page generally offers several keys by which you may search for your record. It allows you to narrow down your search by entering in more than one type of criteria.




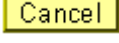
Using Wildcards

PeopleSoft applications support three wildcard features when searching for data. These wildcards can be helpful in finding the exact information you want to process. The following are the standard wildcard features.

% (percent sign)	Match one or more characters.
_ (underscore)	Match any single character.
\ (back slash)	Escape character—don't treat the next character as a wildcard.

For example, you can type a number string of possible employee names along with the % sign, such as S%,Frank and the system returns a list of those employees whose names match that criterion of last name starting with "S" and first name "Frank"






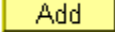


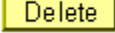

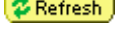


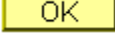

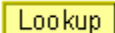

Buttons for Processing Transactions

Button	Name	Function
	Apply	Usually found on a page that you opened by clicking a prompt button. Enables you to apply the data input without returning you to the main page in case you want to perform additional searches.
	Run	Opens the Process Scheduler Request dialog box where you can set up your process control parameters for the current process.
	Okay	Accepts the data input made on an auxiliary page and returns you to the main page.
	Cancel	Clears the page and any data that you may have entered or changed without saving. When you click Cancel, the system doesn't warn you to save changes. Use Cancel if you entered data incorrectly and want to begin again.

More keyboard and link short cut continued on next page...

Short Cut or Hot Keys.

Hot keys perform an immediate action. When you press any of the key combinations below, the designated action occurs. You'll notice that several hot keys perform different functions depending on the page you are in, such as a transaction page or a search page.

Hot Key	Button or Link	Action
Alt+5		Opens lookup page.
		Opens the calendar prompt.
Alt+6	  	Opens the pop-up window on a page.
Alt+7	  	Inserts one or more rows in a grid or scroll area.
Alt+8	 	Deletes row in a grid or scroll area.
Alt+0		When in Expert Entry mode, validates data entered in page.
Alt+ .		Next in grid, scroll, or search page results list.
Alt+ ,		Previous in grid, scroll area, or search page results list.
Alt+ \	<u>Add a New Value</u>	Toggles between "Add a New Value" and "Find an Existing Value" in a Search page.
	<u>Find an Existing Value</u>	
Alt+ /	<u>Find</u>	Find data in grid or scroll area.
Alt+ '	<u>View All</u>	View all rows of data in grid, scroll area or search page results list.
Ctrl+ K	--	When in a search page or transaction page, opens a page with a list of keyboard navigation shortcuts using hot keys and access keys.
Enter		Activates the Okay button where appropriate.
		On a Search page, activates the search button.
		On a Lookup page, activates Lookup button.
Esc		Activates the cancel button where appropriate.

Appendix B

The Components and Tabs:

Component	Page (Tab)	Description	How Updated
Personal Data	Name History	Effective dated, contains first, middle, last name	Insert row
	Address History	Effective dated, contains home and mail address, home phone.	Insert row
	Personal History	Effective dated, contains gender, highest ed. level	Insert row
	Identity/Diversity	Not effective dated, contains birthdate, ss#, ethnicity code	Edit/save
	Veteran Status	Not effective dated, contains veteran and disability information	Edit/save
	Citizenship	Not effective dated, IRSO will maintain this data as necessary	Edit/save
	LBNL Personal Data	Not effective dated, contains release address and UC student checkbox	Edit/save
	LBNL Directory	Not effective dated, contains mailstop, bldg., room, workphone	Edit/save
Job Data	Work Location	Effective dated, contains effective date, action, reason, work location, supervisor	PAF or payroll
	Job Information	Effective dated, contains Job code, empl class, std hrs, full/pt time, etc.	PAF or payroll
	LBNL Miscellaneous	Effective dated, contains union code, confidential, HEERA status, comments	PAF or payroll
	Payroll	Effective dated, contains FICA status, paygroup, etc.	PAF or payroll
	Job Data Salplan	Effective dated, contains salary grade	PAF or payroll
	Compensation	Effective dated, contains comrate, calculated hrly, mthly, annual rates	PAF or payroll
	GSRA Data	Effective dated, contains summary GSRA data, student id, student type, units. GSRA only.	PAF or payroll
	Dept Info	Effective dated, contains Level 0, 1, 2, 3, 4 Orgcode data	PAF or Div Orgcode Data page
	Purchase Order Info	Effective dated contains PO info. Used for contract workers only.	PAF or payroll

Continues on next page....

The Components and Tabs (continued)...

Component	Page (Tab)	Description	How Updated
Employment Data	Employment Data	Not effective dated, contains dates primary actions, service, seniority, appt end date and business title.	Edit/save or Insert row
	Employment Dta2	Not effective dated, contains PI status, Designated Official, Service Award type and date, etc.	Edit/save
	LBNL Guest	Not effective dated, contains Guest appointment information. Used for guests only.	Edit/save
Benefits Program Particip	Benefits Progr Particip	Effective dated contains benefit program and date.	Insert row
Identification Data	Citizenship/Passport	Multiple data rows, contains US Citizenship Status, Passport data, County of Citizenship.	Insert Row or Edit/save. Updated by IRSO only
	Visa/Permit Data	Effective dated contains Visa data.	Insert Row. Updated by IRSO only
	Visa Comments	Effective dated contains Visa data.	Updated by IRSO only
Emergency Contact	Contact Address/Phone	Multiple data rows, contains name and address for emerg contacts	Insert Row or Edit/save
	Other Phone Numbers	Multiple data rows, contains phone contact info for emerg contacts	Insert Row or Edit/save
Track Education	Track Education	Multiple data rows, contains degree, major, school, date, verified	Insert Row or Edit/save.